

# Module 1

## Chapter 4

### Dated Information and DateTracking

#### Chapter Overview

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**Introduction** Information in the DCPDS is either “dated” or “DateTracked.” To use the DCPDS you must understand these features, because you will use them to some extent with every action you process or record you view.

You can view, add, change, or delete information as of any particular date in time – past, present, or future. The way information is dated and DateTracked provides a powerful tool for maintaining a continuous history of information.

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**Terms** This chapter addresses both dated or DateTracked information. Below are brief definitions of each.

Date Type	Definition
Dated	Information about locations, organizations, jobs, positions, grades, pay tables, and other work structures is “dated” information. All dated information has <b>From</b> and <b>To</b> dates that identify when it is/was/will be in effect (the <b>To</b> date is blank for current and future information). Previous versions are maintained in the DCPDS history.
DateTracked	Information on employees, assignments, and compensation and benefits is “DateTracked.” DateTrack is a feature that allows you to view, add, change, or delete information as of any particular date in time – past, present, or future. Through DateTrack, a continuous history of information, and changes to records, is maintained.

## Dated Information

### Purpose

Information about locations, organizations, jobs, positions, grades, pay tables, and other work structures is ***dated*** information.

All dated information has a ***From*** and ***To*** date that identifies when it was/is/will be in effect.

υ **Example:**



### From and To Dates

You enter the ***From*** date when you enter dated information. It is the date when the information becomes effective or valid.

υ **Example:** When you build a position hierarchy, you enter a ***From*** date to indicate the date that particular hierarchy becomes in effect.

The ***To*** date (end date) is automatically assigned when you update the information and, thereby, create a new version.

υ **Example:** When you make changes to the hierarchy, the DCPDS will automatically assign a ***To*** date (end date) to the previous version as you save the new version.

### History

All dated information (for example, positions, hierarchy versions, pay tables) will be maintained in the database, to keep a history over time.

### Business Rule

It is important to understand the following DCPDS business rule related to dated information:



Business Rule	Work Around
<b>You <u>cannot assign</u> an employee to a work structure on a date earlier than the work structure <i>Date From</i> or later than the <i>Date To</i>.</b>	<b>But you <u>can process</u> an assignment action before the effective date</b> , by altering the DateTrack Effective Date to a date on or after the work structure <i>From</i> date. You can also use DateTrack to make a retrospective assignment.

# Understanding DateTrack

## How It Works

Information on employees, assignments, and compensation and benefits is ***DateTracked***. DateTrack is a feature that allows you to view, add, change, or delete information as of any particular date in time – past, present, or future.

To use the DCPDS you must understand the *DateTrack* feature, because you will use it to some extent with every action you process or record you view.

When you are in the DCPDS, you can set a ***DateTrack Effective Date*** in the past or future. You can then view or edit information as of that date. DateTrack ensures that only information effective on that DateTrack date is used for any processing, validation, and reporting actions.

Through DateTrack, a continuous history of information, and changes to records, is maintained.

## Terms

To understand DateTracking, you'll need to understand the following terms:

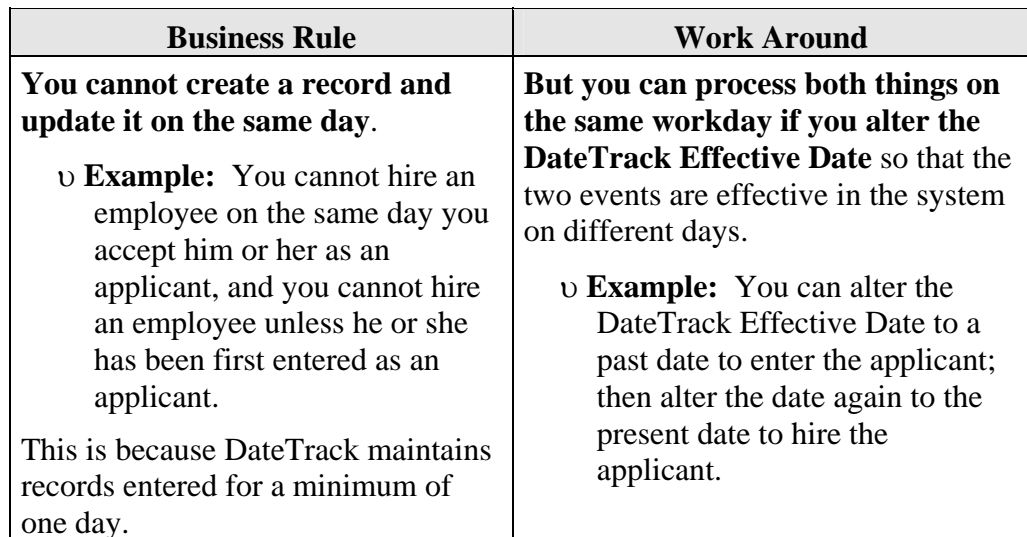
Term	Definition
<b>Effective Date</b>	We are used to thinking of the <i>effective date</i> as the date a personnel action takes effect. In the DCPDS, <i>effective date</i> <b>also</b> refers to the point in time you identify for DateTracking (the date of the snapshot of the record). To avoid confusion, this Users Guide will generally use the term <i>DateTrack Effective Date</i> .
<b>Update</b>	An <i>update</i> is a change to a record where the previous information was valid up until the date of the update. When you <i>update</i> a record, all <u>previous information is preserved</u> , and can be viewed using DateTrack History.
<b>Correction</b>	A <i>correction</i> is a change to a record where the previous information was incorrect. When you <i>correct</i> a record, the new (correct) information <u>overrides previous information</u> that was incorrect (back to the date the error occurred). After the correction, if you view the record in DateTrack History, the correct information will display even during the period of time where the incorrect information was displayed (and related data fields will have been adjusted accordingly).

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## Data Display and Use in DateTrack

<b>DateTrack Effective Date</b>	<b>Information Displayed and Used for Processing, Validation, and Reporting</b>
<b>Past Date</b>	Information as it was on that date.
<b>Current Date</b>	Information as it is today. If any action has already been input that has a future effective date, you will not see it.
<b>Future Date</b>	Information that includes any future dated actions (as of the DateTracked date) that have already been input.

It is important to understand the following DCPDS business rule related to DateTracked information:





### *Fundamentals: Dated Information and Date Tracking*


## Understanding DateTrack, Continued

### DateTrack Buttons and Menu Items

Below are the DateTrack Toolbar buttons and the Main Menu Bar items related to the DateTrack functions you will use. Explanations of when and how you will use these functions are explained in the pages that follow.

Toolbar Button	Main Menu
Alter Effective Date button: 	<b>Tools ▢ <u>A</u>lter Effective Date</b>
DateTrack History button: 	<b>Tools ▢ <u>D</u>ateTrack History</b>

### Current Effective Date Reminder

 **NOTE:** If you need the system set up to remind you of the current effective date each time you begin working on the **People** window, follow your local business rules for setting up this option.

## Altering the DateTrack Effective Date

### Purpose


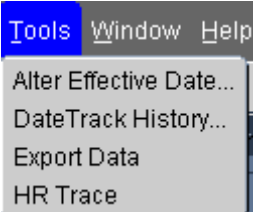


When you log on to the DCPDS, the effective date is always the current date. To view information current at another date, or to make retrospective or future dated changes, you need to change your DateTrack Effective Date.

### Altering the DateTrack Effective Date



To alter the DateTrack effective date, follow the procedures below. Before you do, be sure to save any unsaved data.

**Note:** If you are altering the date to make retrospective or future-dated changes, you need to follow these steps before you enter the changes.

Step	Action
1	<ul style="list-style-type: none"> <li>Click the Alter Effective Date button  on the Toolbar.</li> <li><i>Or</i></li> <li>Click <b>Tools</b> ▢ <b>Alter Effective Date...</b> from the Main Menu Bar.</li> </ul>  <p>The <b>Alter Effective Date</b> window opens:</p> 
2	Type in or use the calendar to enter a new effective date.
3	<p>Click <b>&lt;OK&gt;</b>.</p> <p><b>Note:</b> Whenever you are operating in a DateTrack Effective Date that is different from the current date, the DateTrack Effective Date will be displayed in the Title Bar of every window.</p> <p>↳ <b>Example:</b> </p>

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## Altering the DateTrack Effective Date, Continued

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### Cautions

Whenever you alter the *DateTrack Effective Date*, it is important to remain aware of the date in which you are working, and to reset it as appropriate. Below are some cautions and notes you need to be aware of.



#### Cautions:

- If your current window is a “top-level” window (one that is accessed directly from the **Navigation List**), the new DateTrack Effective Date remains in place until you reset it or exit the DCPDS.
  - If your current window is not a “top-level” window, the new DateTrack Effective Date only applies while you are working in the current window and any windows subsidiary to it. When you return to a top-level window, your DateTrack Effective Date is reset to the previous value.
  - In some cases, when you alter the effective date on a subsidiary window, the DCPDS returns you to the previous window, and you may have to re-query the records you want to view or update.
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## Viewing DateTracked Information and History

### Purpose


The DCPDS maintains a continuous record of changes made to DateTracked information. You can:

- View record information for a particular date (snapshot in time).  
*Or*
- View all of the changes to a record over time (a full history).

### Viewing Information as of a Particular Date

When you view a record in a window that contains DateTracked information (e.g., the **People**  **Enter and Maintain** window), you will see a snapshot of information as of the DateTrack Effective Date in which you are operating. This is either the current date or the date you set by using the Alter Effective Date function.

The procedures below outline how to view information as of a particular date and explain the Effective Dates region in DateTracked windows.

Step	Action
1	Set your DateTrack Effective date: <ul style="list-style-type: none"> <li>• Use the current date.</li> <li><i>Or</i></li> <li>• Follow the procedures in <i>Altering the DateTrack Effective Date</i> to select a past or future date.</li> </ul>
2	Retrieve the record or records you wish to view.
3	Look at the Effective Date region in the window: <p>↳ <b>Example:</b></p>  <p>This Effective Date region shows you the dates between which the information in the snapshot is valid.</p> <p>If there is no <b>To</b> date (end date), then there have been no changes to the date since the <b>From</b> date and there are no future dated changes.</p> <p>If there is a <b>To</b> date, then the record was either deleted or changed the next day. To find out if the record continues to exist, you can use Alter Effective Date to set the DateTrack date to the day after the <b>To</b> date, or use DateTrack History.</p>


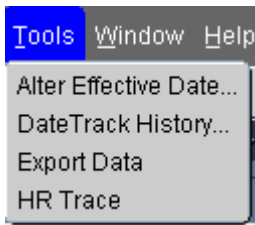
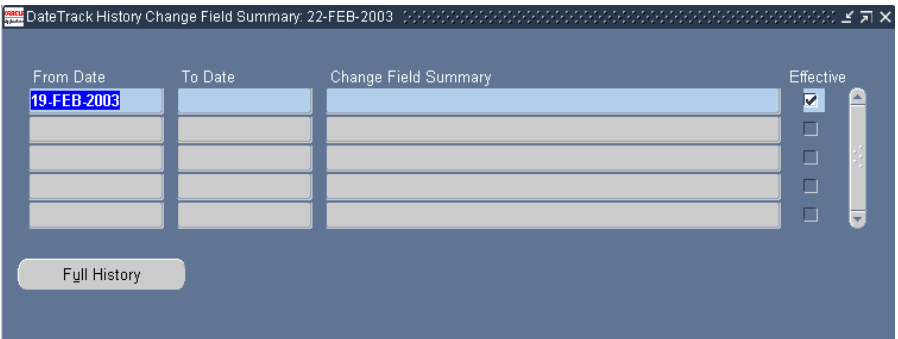

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## Viewing DateTracked Information and History, Continued

### Viewing the DateTrack History of a Record

To see a history of all of the changes to a DateTracked record over time, follow the procedures below:

Step	Action
1	<ul style="list-style-type: none"> <li>Click the DateTrack History icon  on the Toolbar.</li> <li><i>Or</i></li> <li>Click <b>Tools ▢ Date Track History...</b> from the Main Menu Bar.</li> </ul>  <p>The <b>DateTrack History Change Field Summary</b> window opens. Each row shows which data fields were changed, and the corresponding <i>From Date</i>.</p> 
2	<p>Click <b>&lt;Full History&gt;</b> button if you want to open a DateTrack History folder showing the value of each data field between the effective dates. The row for the current snapshot (corresponding to the effective date you are working in) is highlighted.</p> 

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## Updating and Correcting DateTracked Information

**Purpose** Whenever you change DateTracked information, you will be prompted to choose between **Update** and **Correction**.

### Update Vs. Correction



**Caution:** There are important distinctions between **Update** and **Correction**. In most cases, you will be *updating* records, because the previous information was correct; it has just changed. At times it may be necessary to process a *correction*. In these cases, special care should be taken to ensure that the action truly is a correction instead of an update. Below are the distinctions between these two functions and the impact of each on history files.





Term	Definition
Update  	<p>An <i>update</i> is a change to a record where the previous information was valid up until the date of the update. When you <i>update</i> a record, all <u>previous information is preserved</u>, and can be viewed using DateTrack History.</p> <p><b>Example:</b> An employee gets married and changes her name, address, and next of kin information. You Alter the Effective Date to the date of her wedding and input the new information. When saving the changes, you click <b>&lt;Update&gt;</b>. The employee's previous information, up until her wedding date, remains in her history record.</p> <p><b>Note:</b> Information that you enter in the <i>Assignment</i>, <i>Position</i>, and <i>Person Extra Information</i> flexfields is always an update, not a correction.</p>
Correction  	<p>A <i>correction</i> is a change to a record where the previous information was incorrect.</p> <p><b>Example:</b> You discover an error in an employee's record made during the processing of his appointment, relating to his address. You Alter the Effective Date to the date of his appointment and you edit his address information. When saving the changes, you click <b>&lt;Correction&gt;</b>. By choosing <i>correction</i>, you make the record correct, from the beginning.</p> <p><b>Caution:</b> When you <i>correct</i> a record, the new information <u>overrides previous information</u> that was incorrect (back to the date the error occurred). After the correction, if you view the record in DateTrack History, the correct information will display even during the period of time when the information was incorrect</p>

## Updating and Correcting DateTracked Information, Continued

Updating or  
Correcting  
Information




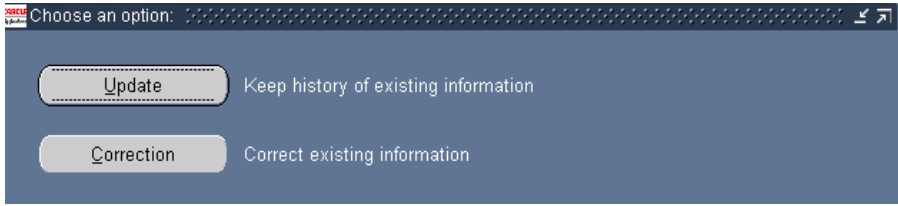
**Note:** You cannot create a record and then update it on the same day

Step	Action
1	<ul style="list-style-type: none"> <li>Click the Alter Effective Date icon  on the Toolbar.</li> <li>Or</li> <li>Click <b>Tools</b> ▾ <b>Alter Effective Date...</b> from the Main Menu Bar.</li> </ul> <p>The <i>Alter Effective Date</i> window opens:</p> 
2	<p>Type in or use the calendar to enter:</p> <ul style="list-style-type: none"> <li>The effective date of the update..</li> </ul>
3	<p>Click &lt;OK&gt;.</p> <p> <b>Note:</b> Whenever you are operating in the DateTrack Effective Date data field that is different from the current date, the DateTrack Effective Date will be displayed in the Title Bar of every window.</p> <p>↳ <b>Example:</b> </p>
4	<p>Edit the data field(s) applicable to the update or correction:</p> <ul style="list-style-type: none"> <li>If a SF-50 is required, access the window(s) with the data fields to be updated through the <b>Navigation List</b> ▾ <b>Request for Personnel Action</b> (for an update) or <b>Navigator List</b> ▾ <b>Request for Personnel Action</b> ▾ <b>Cancellation/Correction</b> (for a correction).</li> <li>If a SF-50 is not required, you can access and edit the data fields without going through the <b>Request for Personnel Action</b> form.</li> </ul>

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## Updating and Correcting DateTracked Information, Continued

### Updating or Correcting Information (continued)

Step	Action
5	<p>Click the Save icon  on the Toolbar.</p> <p>An option window opens:</p> 
6	<ul style="list-style-type: none"> <li>Click &lt;<b>U</b>pside&gt;.</li> </ul> <p><i>Or</i></p> <ul style="list-style-type: none"> <li>Click &lt;<b>C</b>orrection&gt;.</li> </ul>
7	<p>If you are processing a correction: check to see if there is an end date in the Effective Date region of the record. <b>If there is an end date</b>, you have only updated the first snapshot of the record. So...</p> <ul style="list-style-type: none"> <li>Alter the Effective Date to the day after the end date and make the correction again.</li> <li>Repeat this procedure until the <i>To</i> data field is blank, indicating that you have reached the last snapshot of the record.</li> </ul>